

Guardian Beck, Melanie (pro per – maternal grandmother)
 Petitioner Brewer, Tabitha (pro per – mother)

Petition for Visitation

		TABITHA BREWER , mother, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need <i>Notice of Hearing</i> . 2. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Visitation</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Melanie Beck (guardian – maternal grandmother) b. David Brewer (father) c. Paternal grandfather d. Terrie DuMichelle (paternal grandmother) e. Tobias Brewer (minor) f. Tyler Brewer (minor)
		MELANIE BECK , maternal grandmother, was appointed Guardian of the minors on 12/05/11.	
Cont. from		Father: DAVID BREWER	
	Aff.Sub.Wit.	Paternal grandfather: UNKNOWN	
✓	Verified	Paternal grandmother: TERRIE DUMICHELE	
	Inventory		
	PTC		
	Not.Cred.	Maternal grandfather: STEVE MOORE	
	Notice of Hrg	Petitioner requests unsupervised visits with all 4 of her children. She would also like to have overnight visits. She states that she completed a 90 day inpatient program at Westcare and an outpatient program at Turning Point. Petitioner states that she would like to have the visits court ordered because her sister is threatening to call CPS if the guardian allows unsupervised visits. Petitioner states that she has never lost contact with her children or gone more than a couple of days without talking to them.	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: JF
			Reviewed on: 09/23/15
			Updates:
			Recommendation:
			File 1 – Brewer

Probate Status Hearing RE: Filing of the Final Account

DOD: 4/28/01	MAY ISSA LORAH , daughter, was appointed Executor with Full IAEA without bond on 4/2/12.	NEEDS/PROBLEMS/COMMENTS: 1. Need Final Inventory and Appraisal. 2. Need First Account or Petition for Final Distribution.
Aff.Sub.Wit.	Background: On 5/30/12, Ms. Lorah filed a Petition to Determine Ownership of Estate Property and for Order Authorizing and Directing the Transfer of Estate property to Claimant under Probate Code §850, which requested confirmation of a 10% ownership interest in Quetico, LLC, an order confirming that the Estate of Murchd "Mike" Issa, San Diego Superior Court Case 37-2011-00150022-PR-LS-NC (this decedent's post-deceased spouse) has no ownership interest in the LLC.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail	JANE B. LORENZ, as Special Administrator for the ESTATE OF MURCHED MARK ISSA filed a motion to transfer the petition to be heard in San Diego Superior Court .	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	On 10/29/12, the Court granted the motion and ordered the petition transferred to San Diego Superior Court.	
Conf. Screen		
Letters		
Duties/Supp	Executor filed a Report of Status on 9/3/15 that states the estate is not in a position to close. A Case Management Conference on the above-referenced petition was continued to 1/9/15. On 1/9/15, the Court sustained all objections to judicial notices and ruled on stipulated facts that the Quetico asset was community property of the marriage. Decedent's consent to the purchase agreement did not constitute a sufficient transmutation to change its community property characterization under Family Code §760. Although the Court confirmed that Quetico was community property, the issue regarding whether the 10% remaining interest should be probated in Olivia's or Murchd's estate has not yet been determined. The matter has been continued to 9/11/15.	
Objections		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice	Supplement to Status Report filed 9/17/15 states on 9/11/15, Honorable Julia C. Kelety, Judge of the San Diego Superior Court granted the petition. Therefore, upon procuring the Quetico asset, the estate will be in a position to close. It is hereby requested that administration be extended until 4/30/16 in order to allow Petitioner to marshal this asset and close this estate.	

Reviewed by: skc
Reviewed on: 9/21/15
Updates:
Recommendation:
File 2 – Issa

3 Leticia Wilson (GUARD/P) Case No. 12CEPR00762

Petitioner Palacios, Shannalee (Pro Per – Mother)

Attorney Kirkland, Alexia (for Katie Cipolla – Objector)

Petition for Visitation

Age: 5 years		SHANNALEE PALACIOS , mother, is petitioner. <u>Please see petition for details</u>	NEEDS/PROBLEMS/COMMENTS: Minute Order of 08/27/2015: Matter is continued for proper service as to the father, Martin Mendoza, and Katie Cipolla, guardian. Any response by Ms. Cipolla is to be filed and served by 09/17/2015. 1. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Visitation for: <ul style="list-style-type: none"> Martin Mendoza (Father) Note: Declaration of Due Diligence filed 09/17/2015 states petitioner went to father's last known address and spoke to his mother and sister. They do not know his current whereabouts however they do believe he is in Mexico. 2. Notice of Hearing filed 09/17/2015 indicates the father, Martin Mendoza, was served by mail c/o Nena Mendoza. Service must be directly to the individual and cannot be in c/o another individual.
Cont. from 082715			
<input type="checkbox"/>	Aff.Sub.Wit.		
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<input type="checkbox"/>	CI Report		
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		Reviewed by: LV	
		Reviewed on: 09/22/2015	
		Updates:	
		Recommendation:	
		File 3 – Wilson	

DOD: 11/26/12	BETTY PHILLIPS and ROSE LEE LITTLE,	NEEDS/PROBLEMS/COMMENTS:
	sisters, were appointed Co-Executors	
	with full IAEA and without bond on	
	06/11/13. Letters Testamentary were	
	issued on 06/11/13.	
Cont. from 080814, 102314, 012115, 042215, 062415, 070915	Inventory & Appraisal, partial no. 1, filed	<u>CONTINUED FROM 07/09/15</u>
	02/13/14 - \$615,000.00	Minute Order from 07/09/15 states: It
Aff.Sub.Wit.	Inventory & Appraisal, final, filed	has been confirmed that the default
Verified	07/17/14 - \$63,096.95	has not yet been processed in the
Inventory		Civil department.
PTC	Status Report filed 09/22/15 states: a	1. Need Account/Report on Waiver
Not.Cred.	request for default judgment against	of Account and Petition for Final
Notice of Hrg	Karlie Steinhauer and Jamie Rust,	Distribution <u>and/or</u> current written
Aff.Mail	defendants in the civil action Phillips	status report.
Aff.Pub.	and Little vs. Steinhauer and Rust was	
Sp.Ntc.	filed on 05/26/15. A judgment against	
Pers.Serv.	Steinhauer and Rust is necessary for	
Conf. Screen	inclusion as an asset of this Estate. As of	
Letters	09/22/15, Petitioner is still waiting for a	
Duties/Supp	Judgment to be entered by the Court.	
Objections	The Judgment is in excess of \$56,000.00.	
Video Receipt	Upon entry of the judgment against	
CI Report	Steinhauer and Rust, it is believed that	
9202	the estate will be in a condition to be	
Order	closed.	
Aff. Posting		Reviewed by: JF
Status Rpt		Reviewed on: 09/21/15
UCCJEA		Updates: 09/22/15
Citation		Recommendation:
FTB Notice		File 4 – Kiramidjian

DOD: 1/09/13	JACKI DRIVER , girlfriend, was appointed Executor with full IAEA and without bond on 12/05/13. Letters Testamentary were issued on 12/05/13.	NEEDS/PROBLEMS/COMMENTS:
		<u>Continued from 8/7/14, 9/25/14, 12/4/14</u>
Cont. from 080714, 092514, 120414, 062515	Inventory & Appraisal filed 11/25/14 - \$262,500.00	<u>Note:</u> Minute Order 12/4/14 indicates that an amended Inventory and Appraisal will be filed.
Aff.Sub.Wit.		<u>Minute Order 6/25/15:</u> Counsel represents that mediation is set for the end of July regarding a lawsuit involving real property/damages to the real property that should be included in the estate; he requests 3 months. If the final I&A is not filed at least two court days prior to 9/24/15, then a written status report verified by his client is to be filed.
Verified		As of 9/21/15, nothing further has been filed.
Inventory		<u>The following issue remains:</u>
PTC		1. Inventory & Appraisal filed 11/25/14 is marked that it is a final Inventory & Appraisal, however item 3 is marked that the assets inventories only represent a portion of the estate. Therefore it appears that there may be additional estate assets to inventory. Need clarification and/or amended final I&A.
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: JF/skc
Status Rpt		Reviewed on: 9/21/15
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 5A – Rusconi

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

DOD: 1/9/13		JACKI DRIVER was appointed Executor with Full IAEA without bond on 12/5/13. At the hearing on 12/5/13, the Court set this status hearing for the filing of the first account or petition for final distribution.	NEEDS/PROBLEMS/COMMENTS: <u>Continued from 2/6/15, 6/25/15</u> 1. Need first account or petition for final distribution pursuant to Probate Code §12200 or verified written status report pursuant to Local Rule 7.5.	
Cont from 020615, 062515				
<input type="checkbox"/>	Aff.Sub.Wit.			<input type="checkbox"/>
<input type="checkbox"/>	Verified			<input type="checkbox"/>
<input type="checkbox"/>	Inventory			<input type="checkbox"/>
<input type="checkbox"/>	PTC			<input type="checkbox"/>
<input type="checkbox"/>	Not.Cred.			<input type="checkbox"/>
<input type="checkbox"/>	Notice of Hrg			<input type="checkbox"/>
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<input type="checkbox"/>	Video Receipt			<input type="checkbox"/>
<input type="checkbox"/>	CI Report			<input type="checkbox"/>
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<input type="checkbox"/>	Order			<input type="checkbox"/>
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<input type="checkbox"/>	Status Rpt			<input type="checkbox"/>
<input type="checkbox"/>	UCCJEA			<input type="checkbox"/>
<input type="checkbox"/>	Citation			<input type="checkbox"/>
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Reviewed by: skc				
Reviewed on: 9/21/15				
Updates:				
Recommendation:				
File 5B - Rusconi				

DOD: 07/24/11	PAT DESANTIS, friend, was appointed Administrator with Limited IAEA and without bond on 06/06/14. Letters of Administration were issued on 06/20/14.
Cont. from 050115, 061115	Inventory & Appraisal, Amended final, filed 11/06/14- \$350,000.00
Aff.Sub.Wit.	Status Report filed 09/22/15 states: The only assets of the estate are interests in various parcels of agricultural land. The real properties are listed for sale but it appears there are no buyers due to the drought and other factors regarding the property. The estate tax return was filed 08/31/15 without payment so that penalties for late filing of the return would cease. As there is no cash in the estate, the administrator has discussed the payment due with the heirs of the estate who will be paying the estate taxes due out of their own monies. The two heirs at law are the surviving daughters of the decedent who are non-resident, non-citizen beneficiaries. The executor is currently talking with the CPA to discuss the manner of distribution to the heirs and what tax consequences will be imposed under different methods of distribution. A 90 day continuance is requested to allow for tax issues to be resolved.
Verified	
✓ Inventory	
PTC	
Not.Cred.	
Notice of Hrg	
Aff.Mail	
Aff.Pub.	
Sp.Ntc.	
Pers.Serv.	
Conf. Screen	
Letters	
Duties/Supp	
Objections	
Video Receipt	
CI Report	
9202	
Order	
Aff. Posting	
Status Rpt	
UCCJEA	
Citation	
FTB Notice	

NEEDS/PROBLEMS/COMMENTS:
<u>CONTINUED FROM 06/11/15</u> Minute Order from 06/11/15 states: The property remains unlisted at this time. An updated status report verified by Mr. DeSantis is to be filed unless the accounting is filed at least two court days prior to 09/24/15.
1. Need First Account and/or Petition for Final Distribution.
Note: Status Report filed 09/22/15 is not verified by Mr. DeSantis.
Reviewed by: JF
Reviewed on: 09/21/15
Updates: 09/22/15
Recommendation:
File 6 – Di Donna

Probate Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

DOD: 4/3/2014	BRITTNEY MARIE LANE , daughter, was appointed Administrator on 6/5/2014. Letters issued on 6/20/2014.	NEEDS/PROBLEMS/COMMENTS:
	<i>Final Inventory and Appraisal</i> filed 10/28/2014 shows an estate value of \$284,806.04.	
Cont. from 080615	Status Report filed 7/27/2015 for the previous Status Hearing states:	<p align="center">OFF CALENDAR</p> <p>Final Account and Report of Administrator filed 9/22/2015 is set for hearing on 11/3/2015.</p> <p><u>Continued from 8/6/2015.</u> Minute Order states if accounting is filed 2 days before hearing then Status Hearing may come off calendar.</p> <p>1. Need first account and/or petition for final distribution.</p>
Aff.Sub.Wit.	<ul style="list-style-type: none"> The largest asset of the estate was the residence owned by the Decedent; the Administrator and her attorney negotiated the sale of such property to one of the creditors of the estate; 	
Verified	<ul style="list-style-type: none"> Pursuant to the agreement terms, the down payment of the buyer (William Jensen) satisfied the creditor's claims filed by Mr. Jensen, Forkner Crest Community Association, and Provident Funding Associates; 	
Inventory	<ul style="list-style-type: none"> The estate balance of the purchase price is represented by a promissory note to the estate, secured by a first priority deed of trust in such property; this transaction closed in February 2015; 	
PTC	<ul style="list-style-type: none"> Provident Funding Associates and Mr. Jensen signed satisfactions of creditor's claims [filed 4/2/2015; 5/21/2015]; 	
Not.Cred.	<ul style="list-style-type: none"> Forkner Crest Community Association did not sign or deliver a satisfaction or withdrawal of creditor's claim; 	
Notice of Hrg	<ul style="list-style-type: none"> A creditor's claim was filed by St. Agnes Medical Center [on 1/5/2015], and while the claim was allowed the debt appears to have been satisfied by Decedent's healthcare insurance; they are informed that no amounts are due to St. Agnes but it has yet to withdraw its creditor's claim; 	
Aff.Mail	<ul style="list-style-type: none"> In addition to working to clear the creditor's claims, the Administrator is waiting for refunds from the IRS and Franchise Tax Board, which relate to the Decedent's 2014 income tax returns; 	
Aff.Pub.	<ul style="list-style-type: none"> The returns were filed in April 2015, but the refunds have not yet been received; the Administrator is contacting the IRS and the Franchise Tax Board to find out the status of the refunds; 	
Sp.Ntc.	<ul style="list-style-type: none"> The estate is in a position to be closed except for the missing tax refunds and the withdrawal of the St. Agnes and Forkner Crest creditor's claims; 	
Pers.Serv.	<ul style="list-style-type: none"> It is anticipated that the Petition for Final Distribution will be filed by 8/30/2015; if the refunds are not received by the time the petition is filed, the bank account for the estate will remain open and the funds distributed to an omnibus clause in the order. 	
Conf. Screen		
Letters 062014		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

8 Donald Ray Henry (Estate) Case No. 14CEPR00541

Attorney Fogderude, Eric K. (for Mary Ann Henry – Executor)

Probate Status Hearing Re: Filing of First and Final Distribution

DOD: 04/01/2014	MARY ANN HENRY , was appointed executor, with full IAEA authority without bond on 07/24/2014.	NEEDS/PROBLEMS/COMMENTS: 1. Need First Account or Petition for Final Distribution.
	Letters issued on 07/28/2014.	
Cont. from		
Aff.Sub.Wit.	Final Corrected Inventory and Appraisal filed 09/18/2015 shows an estate valued at \$384,228.43.	
Verified		
Inventory		
PTC		
Not.Cred.	Minute Order of 07/24/2014 set this Status Hearing for the filing of the First and Final Distribution.	
Notice of Hrg		
Aff.Mail	Status Report filed 09/08/2015 states the Declarant is still in the process of determining the exact title to various assets of the estate and is anticipating preparing and filing and amended Inventory and Appraisement.	
Aff.Pub.	Declarant is also in the process of negotiating a distribution agreement among the beneficiaries of the estate in order to expedite the distribution process, and it is anticipated that both matters should be completed within the next two or three months. The estate will then be ready for distribution.	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 09/22/2015
		Updates:
		Recommendation:
		File 8 – Henry

Attorney
Attorney

Tekunoff, Daniel J. and Paul Pimentel (for Petitioner Robert Chung)
Krbechek, Randolph (for Respondent Susan Hanley)

Probate Status Hearing RE: Resolution of the Case and Surcharge Issue

Helene Chung DOD 10-6-12 Cont. from <table border="1"> <tr><td>Aff.Sub.Wit.</td><td></td></tr> <tr><td>Verified</td><td></td></tr> <tr><td>Inventory</td><td></td></tr> <tr><td>PTC</td><td></td></tr> <tr><td>Not.Cred.</td><td></td></tr> <tr><td>Notice of Hrg</td><td></td></tr> <tr><td>Aff.Mail</td><td></td></tr> <tr><td>Aff.Pub.</td><td></td></tr> <tr><td>Sp.Ntc.</td><td></td></tr> <tr><td>Pers.Serv.</td><td></td></tr> <tr><td>Conf. Screen</td><td></td></tr> <tr><td>Letters</td><td></td></tr> <tr><td>Duties/Supp</td><td></td></tr> <tr><td>Objections</td><td></td></tr> <tr><td>Video Receipt</td><td></td></tr> <tr><td>CI Report</td><td></td></tr> <tr><td>9202</td><td></td></tr> <tr><td>Order</td><td></td></tr> <tr><td>Aff. Posting</td><td></td></tr> <tr><td>Status Rpt</td><td></td></tr> <tr><td>UCCJEA</td><td></td></tr> <tr><td>Citation</td><td></td></tr> <tr><td>FTB Notice</td><td></td></tr> </table>	Aff.Sub.Wit.		Verified		Inventory		PTC		Not.Cred.		Notice of Hrg		Aff.Mail		Aff.Pub.		Sp.Ntc.		Pers.Serv.		Conf. Screen		Letters		Duties/Supp		Objections		Video Receipt		CI Report		9202		Order		Aff. Posting		Status Rpt		UCCJEA		Citation		FTB Notice		<p>On 07/16/14, ROBERT CHUNG, Beneficiary and named successor trustee, filed a Petition for Removal of Trustee, Accounting, Surcharge to Trustee for Damage to Estate, Damages for Breach of Fiduciary Duty, and Appointment of Successor Trustee.</p> <p>At the Hearing on 09/02/14, no Response having been filed and no appearances made by Respondent, the Court granted the Petition.</p> <p>On 10/01/14, Respondent, SUSAN HANLEY, filed a Notice of Motion and Motion for Order Setting Aside and Vacating Order Removing Trustee and supporting documents.</p> <p>On 10/21/14, the Court vacated its previous Order removing Susan Hanley as trustee.</p> <p>Verified Answer to Petition for Removal of Trustee, etc. was filed by Susan Hanley on 11/06/14.</p> <p>Minute Order from hearing on 12/02/14 set the matter for trial on 03/13/15.</p> <p>Minute Order from trial on 03/13/15 set this status hearing re Resolution of the Case and Issue of Surcharge and states: Parties have reached an agreement as to the removal of the Trustee and have a formal written resignation; a written stipulation is being circulated for signatures. Counsel are to file written Status Reports at least 2 court days prior to 09/24/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>As of 09/22/15, nothing has been filed in this matter since the 03/13/15 minute order.</p> <p>1. Need Status Reports.</p>
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		File 9 – Chung																																														

Probate Status Hearing RE: Filing of the Inventory and Appraisal

	DILILA EULULIA AGANZA , mother, was appointed guardian of the estate on 4/23/15.	NEEDS/PROBLEMS/COMMENTS: 1. Inventory and Appraisal, part 1, filed on 8/26/15 includes assets (mutual funds) that need to be appraised by the Probate Referee. Need amended inventory and appraisal. 2. Inventory and appraisal filed on 8/26/15 is only a partial inventory. Need final Inventory and appraisal or current written status report.
	Minute order dated 4/23/15 stated the order was to be signed ex parte.	
Cont. from 082715		
Aff.Sub.Wit.		
Verified	The order appointing guardian was signed on 8/17/15 and ordered all funds into a blocked account.	
Inventory		
PTC		
Not.Cred.	Letters issued on 8/20/15.	
Notice of Hrg		
Aff.Mail	Blocking order signed 8/17/15 ordered \$11,907.11 into a blocked account.	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	Inventory and Appraisal, partial no. 1, filed on 8/26/15 shows a value of \$11,325.38.	
Conf. Screen		
Letters		
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Objections		
Video Receipt		
CI Report		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 9/22/15
		Updates:
		Recommendation:
		File 10A – Gonzalez

Probate Status Hearing RE: Receipt for Blocked Account

		<p>DILILA EULULIA AGANZA, mother, was appointed guardian of the estate on 4/23/15.</p> <p>The order appointing guardian was signed on 8/17/15 and ordered all funds into a blocked account.</p> <p>Blocking order signed 8/17/15 ordered \$11,907.11 into a blocked account.</p> <p>Minute Order dated 8/27/15 set this status hearing for the filing of the receipts for blocked account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Receipt for Blocked Account or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>				
Cont. from							
<input type="checkbox"/>	Aff.Sub.Wit.						
<input type="checkbox"/>	Verified						
<input type="checkbox"/>	Inventory						
<input type="checkbox"/>	PTC						
<input type="checkbox"/>	Not.Cred.						
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Reviewed by: KT							
Reviewed on: 9/22/15							
Updates:							
Recommendation:							
File 10B – Gonzalez							

Petitioner

Ferguson, Anita Marie (Pro Per – Fiancee – Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to
Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 7/25/14		ANITA MARIE FERGUSON,	NEEDS/PROBLEMS/COMMENTS:
		named executor without bond, is	
		Petitioner.	Continued from 5/7/15, 6/18/15, 8/13/15
		Full IAEA – need publication	The following issues remain noted:
Cont from 050715, 061815, 081315		Will dated 3/14/04	
✓	Aff.Sub.Wit.		<ol style="list-style-type: none"> Need clarification re Decedent's name: Petitioner spells the decedent's last name "FLEMMING" on the petition, but elsewhere spells it "FLEMING." Note: The will appears to reflect "FLEMING" in the decedent's handwriting on Page 1. Need Notice of Petition to Administer Estate and proof of service on Anne Todd Cortez (sister) pursuant to Probate Code §8110. Need proof of publication pursuant to Probate Code §8120. This case was opened with a fee waiver. Please note that upon distribution, all Court filing fees will be due.
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	x	
	Aff.Mail	x	
	Aff.Pub.	x	
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 9/21/15
			Updates:
			Recommendation:
			File 11 - Flemming

Status Re: Amended Petition filed and Setting Trial Date

		<p>RACHELLE RAE ROBLES RICO and JEREMY LELAND HERNANDEZ, grandchildren and heirs of the decedent and beneficiaries of the trust, filed a Petition for Suspension or Removal of Ruth Eileen Bise Rios as Trustee and Personal Representative, for Order Compelling Ruth Eileen Bise Rios to Turn over All of the Assets in Her Care, Possession, Custody and Control, & for Accounting to be Filed with the Court, and for Attorney's Fees, for Breach of Fiduciary Duty and Attorneys' Fees, for Tortious Interference with Right to Inherit, for Injunction & Removal from Residence, for Order Enjoining Trustee from Using Trust Assets to Defend Herself in this Action, for Conversion.</p> <p>At the hearing on 8/6/15, the Court set this status hearing re confirmation of amended petition filed and setting trial date.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: An Amended Petition was filed 8/12/15. See Page D.</p> <p>This Status page remains on calendar re trial setting.</p>
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: skc	
		Reviewed on: 9/21/15	
		Updates:	
		Recommendation:	
		File 12C - Jones	

12B

The Julia G. Jones 2000 Trust**Case No. 15CEPR00428**

Attorney

Ladley, Candace K., and Martinez, Marla, for Petitioners)

Attorney

Mele, James J. (for Trustee Ruth Aileen Bise – Objector)

First Amended Petition (1) for Suspension or Removal of Ruth Eileen Bise Rios as Trustee and Personal Representative, (2) for Order Compelling Ruth Eileen Bise Rios to Turn over All of the Assets in Her Care, Possession, Custody and Control, for Further Accounting to be Filed with the Court, and for Attorney's Fees, (3) for Breach of Fiduciary Duty and Attorneys' Fees, (4) for Tortious Interference with Right to Inherit, (5) for Injunction & Removal from Residence, (6) for Order Enjoining Trustee from Using Trust Assets to Defend Herself in this Action, (7) for Conversion

Julia G. Jones		<p>RACHELLE RAE ROBLES RICO and JEREMY LELAND HERNANDEZ, grandchildren and heirs of the decedent and beneficiaries of the trust, are Petitioners.</p> <p>Petitioners allege the Trust that is the subject of this petition was created pursuant to a written declaration of trust by JULIA G. JONES, entitled the JULIA G. JONES 2000 TRUST.</p> <p>JULIA JONES died in 2009.</p> <p>The Trust provides that after decedent's death, decedent's daughter, MARY VIRGINIA JONES PADILLA ("GINNA"), shall have a life estate for the exclusive use of the lower level of the decedent's residence. GINNA recently died terminating the life estate.</p> <p>The Trust provides that the upper level of the decedent's residence shall be held in trust for use by the family members which shall include the Petitioners, RUTH EILEEN BISE RIOS, GINNA and KURT ARNOLD. "All use of the upper level of the residence shall be subject to the discretion of the trustee and the trustee shall be solely responsible for the scheduling. It is expected that the trustee shall be reasonable and fair to all concerned, however, the discretion of the trustee is incontestable by anyone."</p> <p>KURT ARNOLD, the decedent's grandson, is named successor Trustee upon the death of the decedent. KURT ARNOLD died in 2013. Upon his death, RUTH became the Successor Trustee, and is presently acting as said Trustee.</p> <p style="text-align: center;">Please see additional page</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. If Petitioners' Requests to Waive Court Fees are not granted, need \$435.00 filing fee for this petition.</p> <p>2. Need Order</p>
DOD: 2009			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order X		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: skc/KT</p> <p>Reviewed on: 9/23/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 12D – Jones</p>	

12B

Since **RUTH** became Trustee, she has ousted all of the other family members from the decedent's residence, refused to allow anyone, except herself and her friends, to use the decedent's residence, contrary to the terms of the Trust, to the detriment of Petitioners.

Petitioners are informed and believe that **RUTH** is using the balance of the Trust assets to pay for the maintenance of the subject residence, to the detriment of Petitioners.

RUTH failed and refused to provide the beneficiaries of the Trust with any accountings even though Petitioners had made a reasonable request, in writing, more than 60 days ago, and the Respondent had never filed an accounting at that time. **RUTH** finally provided an accounting to the beneficiaries in her response to the within petition.

RUTH has failed and refused to give notice to Petitioners as required under Probate Code Section 16061.7

Petitioners pray for an Order of this Court:

1. Suspending or Removing Respondent **RUTH EILEEN BISE RIOS** as successor Trustee of the Julia G. Jones Trust dated 6/27/00;
2. Compelling Respondent **RUTH EILEEN BISE RIOS** to turn over all Trust assets in her possession, custody and control to a court appointed Trustee of the Julia G. Jones 2000 Trust;
3. Compelling Respondent **RUTH EILEEN BISE RIOS** to file a further accounting with the court and serve it upon Petitioners and all trust beneficiaries within 30 days of the Court's Order on the Petition or such other time as the Court deems appropriate;
4. Compelling Respondent **RUTH EILEEN BISE RIOS** to surrender any Trust property in her possession, custody and control to Petitioners or alternatively suspending any powers **RUTH EILEEN BISE RIOS** holds as successor trustee pending the Court's decision on this petition;
5. Declaring that all actions taken by Respondent **RUTH EILEEN BISE RIOS** constitute a tortious interference with Petitioners' right to inherit from the trust, and that punitive damages should be awarded to Petitioners in an amount of **\$5,000,000.00**;
6. Declaring that Respondent **RUTH EILEEN BISE RIOS** hold the assets of the purported trust for the persons entitled to distribution of the trust;
7. Finding that Respondent **RUTH EILEEN BISE RIOS** is liable to Petitioners for punitive damages;
8. Finding that Respondent **RUTH EILEEN BISE RIOS** is liable to Petitioners for attorney fees and costs;
9. For such other orders as the Court may deem just and proper.

13A

Jean Walters (CONS/PE)

Case No. 15CEPR00545

Attorney

Kruthers, Heather H. (for Public Guardian – Petitioner)

Attorney

Teixeira, J. Stanley (Court appointed for proposed Conservatee)

Attorney

Petty, Teresa B., in association with Horton, Lisa M. (for Robert Renovato – Objector)

Petition for Appointment of Probate Conservator of the Person and Estate

		TEMPORARY EXPIRES 9/24/15		NEEDS/PROBLEMS/COMMENTS:	
		(Ms. Walters' placement is confidential.)			
		PUBLIC GUARDIAN is Petitioner and requests appointment as Conservator of the Person with medical consent powers under Probate Code §2355 and dementia medication powers under Probate Code §2356.5 and as Conservator of the Estate.		Page 13B is the competing Petition filed by Kenneth A. Kearns.	
Cont from 070115, 072915				Continued from 9/16/15	
	Aff.Sub.Wit.			per Minute Order dated 7/29/15, to meet up with new petition filed by Kenneth A. Kearns. Letters to Public Guardian also extended to 9/24/15.	
✓	Verified			Court Investigator advised rights on 6/19/15	
	Inventory			Voting rights affected – need minute order	
	PTC			Note: A Request for Special Notice was filed 6/22/15 by interested person Kathy Walters of Woodland Hills, CA, by her attorney, Christopher E. Overgaard of Glendale, CA. Kathryn Walters is Ms. Walters' niece and conservator of Ms. Walters' brother Robert Walters.	
	Not.Cred.			Note: If granted, the Court will set status hearings for the filing of the I&A and first account.	
✓	Notice of Hrg			Reviewed by: LEG for skc	
✓	Aff.Mail		W	Reviewed on: 9/23/15	
	Aff.Pub.			Updates:	
	Sp.Ntc.			Recommendation:	
✓	Pers.Serv.		W	File 13A – Walters	
	Conf. Screen				
✓	Letters				
	Duties/Supp				
✓	Objections				
	Video Receipt				
✓	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
	UCCJEA				
✓	Citation				
	FTB Notice				

13A

Attorney Shahbazian, Steven L. (for Competing Petitioner Kenneth A. Kearns, family friend)
 Attorney Teixeira, J. Stanley (Court-appointed for Conservatee)
 Attorney Kruthers, Heather H. (for Petitioner Public Guardian)
 Attorney Petty, Teresa B. (for Objector Robert Renovato, friend)
 Attorney Horton, Lisa M. (by association, also for Objector Robert Renovato, friend)
 Attorney Overgaard, Christopher E., of Glendale (for Kathy Walters, niece, of Woodland Hills)

Petition for Appointment of Probate Conservator of the Person and Estate

			KENNETH A. KEARNS , family friend, is Petitioner and requests appointment as Conservator of the Person with medical consent and dementia powers to administer dementia medications, and for placement in a secured-perimeter facility; and of the Estate with bond. <p style="text-align: center;"><i>~Please see Petition for details~</i></p> <p>Court Investigator's Report was filed on 9/21/2015.</p>	NEEDS/PROBLEMS/COMMENTS: Court Investigator Advised Rights on 9/2/2015. Voting Rights Affected – Need Minute Order. 1. Estimated value of the estate in the <i>Petition</i> calculates as \$86,741.00 . Therefore, Bond is required in the sum of \$95,415.10 pursuant to Probate Code § 2320 and CA Rule of Court 7.207. 2. Need <i>Duties of Conservator</i> form signed by Petitioner to be filed with the Court. 3. Need <i>Conservatorship Video Viewing Certificate</i> from Petitioner pursuant to Local Rule 7.15.8(A) to be filed with the Court. <p style="text-align: center;"><i>~Please see additional page~</i></p>
Cont. from				
✓	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
	Duties/Supp	X		
	Objections			
	Video Receipt	X		
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
Reviewed by: LEG				
Reviewed on: 9/23/15				
Updates:				
Recommendation:				
File 13B – Walters				

NEEDS/PROBLEMS/COMMENTS, continued:

4. *Petition* requests authority to sell the Conservatee's personal residence, but does not include information pursuant to Probate Code § 2540 which states the Conservator shall inform the court as to whether the Conservatee supports or is opposed to the proposed sale. Need declaration as required by Probate Code § 2540(b) regarding discussion with Conservatee regarding proposed sale.

Note: Item 9(a)(5) of the *Capacity Declaration* filed 5/27/2015 indicates a "locked or secured-perimeter facility is NOT the least restrictive environment" appropriate for the needs of proposed Conservatee.

Note: If *Petition* is granted, Court will set status hearings as follows:

- **Monday, October 26, 2015 at 9:00 a.m. in Dept. 303 for filing proof of bond;**
- **Monday, January 25, 2016 at 9:00 a.m. in Dept. 303 for filing of inventory and appraisal; and**
- **Monday, November 28, 2016 at 9:00 a.m. in Dept. 303 for filing of first account of the conservatorship.**

Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.

14 Dylan Matney (GUARD/P)**Case No. 15CEPR00633**

Petitioner: Carol Jean Steinhauer (pro per)

Petitioner: Don Mannon (pro per)

Petition to Appoint Guardian of the Person

		<p>THERE IS NO TEMPORARY. No temporary was requested.</p> <p>CAROL STEINHAUER and DON MANNON, non-relatives, are petitioners.</p> <p>Please see petition for details.</p> <p>DSS Social Worker Report filed 8/12/15</p> <p>Court Investigator Report filed on 9/21/15</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 8/27/15. Minute order states the court orders Jamie Matney to report forthwith to Avertest to submit to a drug test paid for by Petitioners. Avertest is ordered to release the test results to Jaimy Matney and she is ordered to bring the results to court on 9/24/15. The Court finds the report of the Social Worker unhelpful and orders the Court Investigator to interview all parties and make a recommendation to the Court.</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of the Notice of Hearing along with a copy of the petition or Consent and Waiver of Notice or Declaration of Due Diligence on: <ul style="list-style-type: none"> a. Father 	
Cont. from 082715				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
		<p>Reviewed by: KT</p> <p>Reviewed on: 9/21/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 14 – Matney</p>		

Petition for Appointment of Guardian of the Person

Richard, 6	<u>TEMPORARY EXPIRES 09/24/15</u>		NEEDS/PROBLEMS/COMMENTS:
William, 4	TAMMY LYNN COOPER , paternal aunt, is Petitioner.		
	Father: RICHARD EVERETT COOPER, SR. – <i>Consent & Waiver of Notice filed 08/03/15</i>		
	Mother: SHANNON CAYSON – <i>Personally served on 07/29/15</i>		
Cont. from	Paternal grandfather: GARY COOPER - <i>deceased</i>		
<input type="checkbox"/> Aff.Sub.Wit.	Paternal grandmother: MARY COOPER – <i>Served by mail on 08/04/15</i>		
<input checked="" type="checkbox"/> Verified	Maternal grandfather: DECEASED		
<input type="checkbox"/> Inventory	Maternal grandmother: VICKI BURROS – <i>served by mail on 08/04/15</i>		
<input type="checkbox"/> PTC	Siblings: DESTINY THOMAS (16), ANTHONY CALDWELL (24); ANGELICA GARDEA (1) – <i>Destiny & Anthony served by mail on 08/04/15</i>		
<input type="checkbox"/> Not.Cred.	Petitioner states [see Petition for details].		
<input checked="" type="checkbox"/> Notice of Hrg	Court Investigator Dina Calvillo filed a report on 09/21/15.		
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input checked="" type="checkbox"/> Pers.Serv.	w/		
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input checked="" type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input checked="" type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: JF
			Reviewed on: 09/22/15
			Updates:
			Recommendation:
			File 15 – Cooper

Petition for Appointment of Guardian of the Person

Nickolas, 5		<p><u>TEMPORARY EXPIRES 09/24/15</u></p> <p>SONIA GUTIERREZ-COVARRUBIAS, paternal aunt, is Petitioner.</p> <p>Father: RENE GUTIERREZ-COVARRUBIAS – personally served on 08/25/15</p> <p>Mother: VERONICA MORENO – personally served on 08/21/15</p> <p>Paternal grandfather: FIDEL GUTIERREZ Paternal grandmother: VELIA GUTIERREZ</p> <p>Maternal grandfather: NOT LISTED Maternal grandmother: ROSA SALDANA</p> <p>Petitioner states [see petition for details].</p> <p>Court Investigator Dina Calvillo filed a report on 09/21/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of service by mail at least 15 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:</p> <p>a. Fidel Gutierrez (paternal grandfather)</p> <p>b. Velia Gutierrez (paternal grandfather)</p> <p>c. Maternal grandfather</p> <p>d. Rosa Saldana (maternal grandmother)</p>	
Matthew, 5				
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
✓	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
✓	Notice of Hrg			
<input type="checkbox"/>	Aff.Mail			x
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
✓	Pers.Serv.			w/
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
✓	CI Report			
<input type="checkbox"/>	9202			
✓	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
✓	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		Reviewed by: JF		
		Reviewed on: 09/22/15		
		Updates:		
		Recommendation:		
		File 16 – Gutierrez		

17 Susan Padavick (Det. Succ) Case No. 15CEPR00774**Attorney Dornay, Val J (for Robert Torres and Marlene Padavick – Petitioners)****Petition to Determine Succession to Real Property**

DOD: 05/11/2015	ROBERT TORRES , spouse, and MARLENE PADAVICK , mother, are petitioners.	NEEDS/PROBLEMS/COMMENTS:
	40 days since DOD	
Cont. from	No other proceedings.	
<input type="checkbox"/> Aff.Sub.Wit.		
✓ Verified	I&A - \$110,000.00	
✓ Inventory	Decedent died intestate	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
✓ Notice of Hrg	Petitioner requests Court determination that decedent's 100% interest in real property located at 4617 E. Terrace Ave. Fresno, Ca. pass ½ to Robert Torres and ½ to Marlene Padavick pursuant to intestate succession.	
✓ Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
✓ Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 09/23/2015
		Updates: Submitted
		Recommendation:
		File 17 – Padavick

18 Sidney Lehman (Estate)**Case No. 15CEPR00777****Attorney Lee, Jim D. (of Hanford for Sandy Duane Queen – Petitioner)****Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA**

DOD: 05/15/2015	SANDY DUANE QUEEN , named executor without bond, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need date of death of the deceased spouse pursuant to Local Rule 7.1.1D. 2. Need date of death of the Sandy Duane Queen, Uncle of Predeceased Spouse listed at #8 of the petition, pursuant to Local Rule 7.1.1D. 3. Need Notice to Irene Magee pursuant to the Request for Special Notice filed 09/16/2015. Note: If the petition is granted status hearings will be set as follows: • Thursday, 02/25/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Thursday, 12/01/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
	Full IAEA – o.k.	
	Will dated: 07/05/2012	
Cont. from	Residence: Fresno	
<input type="checkbox"/> Aff.Sub.Wit.	Publication: The Business Journal	
<input checked="" type="checkbox"/> Verified	Estimated value of the Estate:	
<input type="checkbox"/> Inventory	Personal property -\$500,000.00	
<input type="checkbox"/> PTC	Probate Referee: Rick Smith	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input checked="" type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 09/22/2015
		Updates:
		Recommendation:
		File 18 – Lehman

19 John A. Kochergen (Estate)**Case No. 15CEPR00779****Attorney Matlak, Steven M. (for Mike J. Kochergen and Ann J. Shuken – Petitioners –Children)****Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA**

DOD: 06/20/2015	MIKE J. KOCHERGEN , son, and ANN J. SHUKEN , daughter, and named co-executors without bond, are petitioners.	NEEDS/PROBLEMS/COMMENTS:
		Note: If the petition is granted status hearings will be set as follows:
		<ul style="list-style-type: none"> • Thursday, 02/25/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Thursday, 12/01/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution.
Cont. from	Full IAEA – o.k.	
<input type="checkbox"/> Aff.Sub.Wit.	s/p	
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input checked="" type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
	Will dated: 02/11/2014	
	Residence: Fresno	
	Publication: The Business Journal	
	Estimated valued of the estate: Unknown	
	Probate Referee: Rick Smith	
		Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
		Reviewed by: LV
		Reviewed on: 09/22/2015
		Updates:
		Recommendation: Submitted
		File 19 – Kochergen

DOD: 10/06/2014		WENDY D. HUNT , daughter/named executor without bond, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need Affidavit of Publication in the correct newspaper pursuant to Local Rule 7.9A. Petition indicates residence was in Fowler therefore the correct publication should be The Fowler Ensign. Petitioner published in The Business Journal. Note: If the petition is granted status hearings will be set as follows: • Thursday, 02/25/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Thursday, 12/01/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
		Full IAEA – o.k.	
		Will dated: 02/26/2014	
Cont. from		Residence: Fowler	
<input type="checkbox"/>	Aff.Sub.Wit.	s/p	
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LV Reviewed on: 09/22/2015 Updates: Recommendation: File 20 – Gonsalves

Attorney Shepard, Jeff S. (for Petitioners Rosie F. Ybarra and Lupe F. Ybarra)

Spousal or Domestic Partner Property Petition

DOD: 7/23/1975		ROSIE FLORES YBARRA and LUPE FLORES YBARRA , daughters and Co-Administrators of the Estate of ERNESTINA YBARRA (spouse, DOD 11/6/1981), are Petitioners.	NEEDS/PROBLEMS/COMMENTS: Note Re Related Case: Status Hearings are set in the <i>Estate of Ernestina Ybarra</i> , Case 15CEPR00453, on 11/12/2015 for filing of inventory and appraisal; and on 8/11/2016 for filing of the first account and/or petition for final distribution.
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		Petitioners state Decedent and Ernestina Ybarra were married on 9/11/1934 in Phoenix, Arizona, and all property was purchased by Decedent and Ernestina during the marriage, and paid for using funds earned during the marriage.	
		Petitioners request Court determination that real property located on Manning Avenue, Fresno, passes to Petitioners as Co-Administrators of the <i>Estate of Ernestina Ybarra</i> , and Court confirmation that real property located on Manning Avenue, Fresno, belongs to Petitioners as Co-Administrators of the <i>Estate of Ernestina Ybarra</i> .	
		Reviewed by: LEG	
		Reviewed on: 9/22/15	
		Updates:	
		Recommendation: SUBMITTED	
		File 21 – Ybarra	

Petition for Appointment of Temporary Guardian of the Person

		GENERAL HEARING 11/3/15.	NEEDS/PROBLEMS/COMMENTS:
		SARAH MELCHER , maternal grandmother, is petitioner.	Continued from 9/10/15. Minute order states Examiner notes are provided in open court.
		Please see petition for details.	
Cont. from 091015			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W/O	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 9/21/15
			Updates:
			Recommendation:
			File 22 – Luna

Petitioner Boos, Roger Keith (Pro Per Petitioner)

Petition for Appointment of Temporary Guardian of the Person

		<u>General Hearing set for 11/16/2015</u>	NEEDS/PROBLEMS/COMMENTS:
		ROGER KEITH BOOS, non-relative, is Petitioner.	1. Need Notice of Hearing.
Cont. from			2. Need proof of five (5) court days' notice by personal service of the Notice of Hearing with a copy of the Petition for Appointment of Temporary Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence for:
	Aff.Sub.Wit.		
✓	Verified		<ul style="list-style-type: none"> Carolyn Zack, mother, if Court does not excuse notice as Petitioner requests; father.
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 9/22/15
			Updates:
			Recommendation:
			File 23 – Zack

Attorney: Catherine A. Amador (for former Conservators of the estate and current conservators of the person Manuel Chavez and Susan Chavez-Leon)

Attorney: Heather H. Kruthers (for current Conservator of the estate, Public Guardian)

Sixth Amended First Account and Report of Conservators; Petition for Allowance of Fees to Attorney for Conservators.

		MANUEL CHAVEZ , father, and SUSAN CHAVEZ-LEON , sister, Co- Conservators of the Person and Estate, are Petitioners.	NEEDS/PROBLEMS/COMMENTS: Continued from 9/16/15. Minute order states matter continued for a report from the Public Guardian as stated on the 6/24/15 minute order. Minute order from 6/24/15 states the Court Orders Ms. Amador to file any additional papers that may assist the Court in ruling on the Sixth Amended First Account by 9/2/15. The Court further orders the Public Guardian to review the Sixth Amended Account and make any and all recommendations to the Court regarding its settlement and/or surcharges to be imposed against the former conservators, and to file said report by 9/2/15. As of 9/21/15 no additional documents have been filed. Note: Manual Chavez and Susan Chavez-Leon were removed as Co-Conservators of the Estate and the Public Guardian appointed by minute order dated 12/11/15. 1. Upon cursory review, the sixth amended first account does not balance. Charges total \$321,123.66 and Credits total \$317,826.30. Property on hand at the end of the account period totals \$237,282.98. Therefore examiner has not reviewed the rest of the pleadings.
Cont. from 062415, 091615			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: KT	
		Reviewed on: 9/21/15	
		Updates:	
		Recommendation:	
		File 24 - Chavez	

25 Rodolfo Cortez Castillo (Estate) Case No. 15CEPR00746

Petitioner Castillo, Marilyn De La Cruz (Pro Per – Daughter)

Petition for Letters of Administration; Authorization to Administer Under IAEA

DOD: 07/05/2015		MARILYNN DE LA CRUZ CASTILLO,	NEEDS/PROBLEMS/COMMENTS:
		daughter, requests appointment as	
		Administrator without bond.	Minute Order of 09/17/2015: Ms. Castillo is sworn and testifies that the decedent did not have a registered domestic partner or children. The Court indicates that bond will be required; matter continued in order for Ms. Castillo to look into her bondability.
		All heirs waive bond.	
Cont. from 091715		Full IAEA – o.k.	Note: Petitioner filed an Inventory and Appraisal (partial no. 1) however it has not been appraised by the Probate Referee.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		Note: If the petition is granted status hearings will be set as follows:
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		<ul style="list-style-type: none"> • Thursday, 02/25/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Thursday, 12/01/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution.
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input checked="" type="checkbox"/>	Aff.Pub.		Reviewed by: LV
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		Reviewed on: 09/22/2015
<input type="checkbox"/>	Conf. Screen		Updates:
<input checked="" type="checkbox"/>	Letters		Recommendation:
<input checked="" type="checkbox"/>	Duties/Supp		File 25 – Castillo
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		